TASK

Effective Date: March 20, 2015

See Also:

- PRO-U501.B.01 (Sole Source Purchases)
- FRM-U501.B.01 (Sole Source Justification Form)
- FRM-U501.A.03.A (Request for Quote)

TSK-U501.B.01.03 SOLE SOURCE PURCHASES – COMPATIBILITY WITH EXISTING GOODS/SERVICES

This task outlines the process to be followed when submitting a sole source request/justification for “Compatibility With Existing Goods/Services” to Procurement for review and approval.

Definitions:

1. Compatibility with Existing Goods/Services – A department requires an additional part or service that is compatible with existing goods or services (has the capacity to work with the original and/or existing good/service without having to be altered to do so).

Action by: Purchasing Agent (User Department)

Action:

1. Completes LSU Sole Source Justification (See FRM-U501B.01). To maintain compatibility and continuity, department must indicate that the purchase must be made from the original manufacturer/vendor from whom existing equipment was purchased.
   a. If equipment, Department must provide a list of the existing parts/equipment and equipment tag numbers.

2. Obtains a written statement from the supplier confirming the supplier is the sole manufacturer and the sole distributor of the goods or services to be purchased.
   a. If equipment, supplier must confirm only their equipment (no other similar or like equipment from another supplier) will provide for full compatibility and functionality with the existing equipment.

3. Obtains a completed LSU Quote Form from the sole source supplier. (See FRM-U501.A.03.A)

4. Obtains a current insurance certificate from the supplier in the event onsite installation/training is required. Insurance requirements can be found at: http://www.lsu.edu/administration/ofa/procurement/a-z-policies-procedures/insurance-requirements.php
5. **Obtains** the following, if necessary, before submitting requisition:
   a. Equipment operated via an electrical receptacle must have written approval from Facility Services
   b. Equipment being traded in must have written approval from Property Management

6. **Creates** a requisition and **attaches** all required documentation; **Submits** requisition for approval.

7. **Receives** Workday requisition in “In Progress” awaiting review.

8. **Reviews** requisition to ensure compliance of Sole Source Procurement Procedure and Task requirements.

9. **Routes** to Assistant Director/Associate Director/Director for approval.

10. **Issues** Purchase Order upon approval.